



Office of Special Education Request for Proposal

TITLE: Mandated Activities Project, "Michigan's Integrated Behavior and Learning Support Initiative (MiBLSi)" Under the Individuals with Disabilities Education Act (IDEA)

REQUEST FOR PROPOSAL DUE: The original copy bearing ORIGINAL signatures and six (6) additional copies (for a total of seven) of the complete proposal must be received on or before **5:00 p.m., Thursday, April 25, 2013** by **Ms. Liz Hengesbach** at the following address:

Michigan Department of Education
Office of Special Education
P.O. Box 30008
Lansing, Michigan 48909

Or

If shipping by overnight express or UPS mail, the following address must be used:

Michigan Department of Education
Office of Special Education
608 West Allegan Street
Lansing, Michigan 48933

DATE OF ISSUE: Thursday, February 28, 2013

SECTION I: General Information for the Bidder

If awarded this grant, I understand and agree to the following:

I-A PURPOSE

The Individuals with Disabilities Education Act (IDEA) requires state education agencies to have in place effective general supervision systems that provide information dissemination, training and technical assistance, personnel development to/for administrators, teachers, related services providers, parents, and others regarding research and evidence-based practices, as well as requirements of law. The IDEA authorizes use of funds for these provisions under Section 1411(e)(2)(B) and (C).

The project will support school districts to develop local implementation capacity for the effective delivery of professional development, resulting in a durable and sustainable change. The project will improve special education student outcomes in social behavior and academic performance by improving special education services and preventing the need for special education through effective instruction. The educational practices will focus on the use of Positive Behavioral Intervention & Supports, scientifically based reading instruction, and evidence-based math instruction using a multi-tiered system of support (MTSS) within a school-wide model. Additionally, the project will address disproportionality in exclusionary discipline practices in regards to race.

This statewide project supports the State Board of Education's Reform Priorities on Improved Student Achievement Through Innovation by providing educators with access to evidence-based practices in a multi-tiered integrated behavior and academic model; and establishing the conditions necessary for educators to implement these practices with fidelity.

I-B ISSUING OFFICE

This Request for Proposal (RFP) is issued for the State of Michigan by the Michigan Department of Education (MDE), Office of Special Education (OSE). The OSE is the sole point of contact in the State for this RFP. All inquiries relating to this grant should be addressed to:

Mr. John Andrejack, Supervisor, Program Finance
Office of Special Education
2nd Floor, John Hannah Building
P.O. Box 30008
Lansing, MI 48909

I-C GRANT ADMINISTRATOR

Upon receipt at the OSE of the properly executed Grant Agreement(s), it is anticipated that the Director of the OSE will identify the person(s) to be the authorized Grant Contact.

I-D TYPE OF GRANT

This is a fiscal agent grant only. The fiscal agent (successful bidder) will be the grant recipient and will be responsible for facilitating the funding mechanism for two separate IDEA grants for the services and activities to be supported through the MiBLSi project. The Grantee will provide fiscal management for these services and activities as coordinated through the OSE and the MiBLSi Project Director.

I-E FUNDING

The proposal will be awarded up to \$3,350,000 with IDEA, Section 611 mandated activities funds; and up to \$1,386,000 with IDEA State Personnel Development Grant funds; the total amount for these two grants is up to \$4,736,000. Funding will be effective following the approval of the grant awards by the State Superintendent. The funding period is twelve months for each grant beginning October 1, 2013 and ending September 30, 2014 and in one year increments thereafter. Based on satisfactory performance and availability of funds, the project and yearly funding may continue up to five years under the IDEA Section 611 mandated activities funds and four years under the IDEA State Personnel Development Grant funds.

I-F ELIGIBLE APPLICANTS

Intermediate school districts, regional educational service agencies, local education agencies, and public school academies are eligible to submit a proposal. If you plan to submit a proposal, please contact Ms. Liz Hengesbach at (517) 241-1235 prior to the proposal due date of **Thursday, April 25, 2013** so that the appropriate number of review panelists can be secured.

I-G RESPONSE DATE

To be considered, proposals must arrive at the OSE as specified on the cover page of the RFP. Bidders mailing proposals should allow mail delivery time sufficient to ensure timely receipt of their proposals. Proposals which are received after the specified due date and time, regardless of the date of postmark receipt, cannot be considered and will be returned promptly to the bidder. Bidders are solely responsible for the timely arrival of proposals at the OSE. Late proposals and proposals submitted electronically or by facsimile will be returned to the applicant **without review**.

I-H REJECTION OF PROPOSALS

The MDE, OSE reserves the right to reject any and all proposals in whole or in part or to negotiate separately with any sources whatsoever to serve the best interests of the State. Additionally, past performance on other grants will be considered when recommendations for the grant award are made to the State Superintendent. This RFP is made for information and planning purposes only. The State does not intend to award the grant solely on the basis of any response made to this request or otherwise pay for the information solicited or obtained.

I-I PERFORMANCE REPORTING

As a condition of receiving funding, the recipient will provide the MDE, OSE with progress reports describing the project's progress on the approved work plan. The MDE, OSE may place these progress reports on a website. Additional information needed to assist the state in meeting its federal reporting requirements for this program will also be required. Reports may be required by the MDE, OSE at any time. The MDE, OSE reserves the right to suspend or terminate the grant program if there is a lack of progress.

I-J ACKNOWLEDGEMENT

All hard copy and electronic publications including news releases, reports, films, brochures, CD-ROMs, videos, DVDs or any project material developed with funding from this grant must be approved by the MDE, OSE before dissemination. All products and materials must include the following statement:

This document was produced through an IDEA Mandated Activities Grant titled, "enter project title here..." awarded by the Michigan Department of Education. The opinions expressed herein do not necessarily reflect the position or policy of the Michigan Department of Education, the Michigan State Board of Education or the U.S. Department of Education and no endorsement is inferred. This document is in the public domain and may be copied for further distribution when proper credit is given. For further information or inquiries about this project, contact the Office of Special Education, P.O. Box 30008, Lansing, Michigan 48909.

I-K APPLICANT'S CONFERENCE

An applicant's conference call will not be scheduled. However, if you have questions or need clarification regarding the work to be performed, please contact John Andrejack at (517) 241-1235 or Beth Horne at (517) 373-2949.

The OSE retains the right to modify this RFP, if it is necessary, to comply with laws or ensure a clearer understanding of its content. Any information that changes the content, funding amount or filing procedures will be posted on the MDE website and mailed only to the persons who notify the MDE, OSE of their intent to submit a proposal.

I-L ADDENDUM

In the event that it becomes necessary for the OSE to revise any objective in Section II, an addendum will be posted on the MDE website and provided in writing to all potential bidders who have notified the MDE, OSE of their intent to submit a proposal.

I-M ORAL PRESENTATION

Bidders who submit a proposal may be required to make an oral presentation of their proposals to the MDE. These presentations provide an opportunity for bidders to clarify the proposal to ensure thorough mutual understanding. The OSE will schedule these presentations, if required.

I-N PROPOSAL PREPARATION, FONT SIZE, AND PACKAGING

The proposal should be prepared simply and economically, double-spaced, with one inch margins and with a font no smaller than Verdana 11 point. Tables must be developed with a font no smaller than Verdana 11 point, but text may be single-spaced. Proposal narratives must be no longer than 35 pages in length. The program budget and associated narrative may be appended. All application pages must be securely stapled. Special bindings and binders should not be used. Applications submitted but not in accordance with application preparation instructions **will be returned without review.**

SECTION II: WORK STATEMENT

II-A UNDERSTANDING OF NEED

The OSE is seeking a Grantee to serve as fiscal agent for activities and services related to the project identified below. The Fiscal Agent Grantee will provide the fiscal management to this project as coordinated through the OSE and the MiBLSi Project Director. The fiscal agent grantee may also be asked to provide additional support for specified activities.

This project will fund further development and implementation of Michigan's Integrated Behavior and Learning Support Initiative (MiBLSi). MiBLSi has built the foundation by establishing a school-wide model of positive behavior supports and literacy interventions in over 600 schools across Michigan. This project will focus on an intermediate school district (ISD) and local education agency (LEA) district model to develop local capacity to provide professional development to K-12 schools within their districts.

The project is intended to support the MDE, OSE in increasing support to Michigan students, staff, and communities by enabling the scale-up of statewide personnel development, through coordinated leadership, partnerships, and regionalized training and technical assistance. This grant will support 47 ISDs that, in turn have the potential to support 320 LEAs that support 1,600 schools.

The following Focus Areas are specific to this project:

- Improvement in outcomes for participants who receive project products and services (ISDs, LEAs, schools, and students).
- Focused improvements to a statewide professional development/technical assistance delivery model.
- Strategic partnerships (Institutes of Higher Education, professional educational organizations, and Michigan's Parent Training and Information Center).

II-B OBJECTIVES

The Grantee will be responsible for facilitating the funding mechanism for access to and services of specialists, experts, and/or staff with unique services necessary for the implementation of the MiBLSi project. The Grantee, as fiscal agent, will coordinate funding of services and activities through the MiBLSi Project Director and/or Grant Contact at the OSE. The following objectives are specific to the implementation of the grant.

1. Implement fiscal support for services and activities including multiple trainings, conferences, and event/meeting supports.
2. Employ or sub-grant with other agencies for personnel and/or independent contractors as indicated by the OSE or the MiBLSi Project Director to ensure continuity and adherence to stated OSE goals and objectives.

3. Provide access to technical assistance and consultation for advisory teams, grantees, contractors, districts, and staff, as necessary.

II-C TASKS

As stated in II-B, the grantee's responsibility is to serve as fiscal agent for the activities of the project. Exceptions to this would be as noted above in II-B. For the most part, the OSE and MiBLSi Project Director will direct the priorities of the project and the fiscal agent will provide fiscal supports as necessary to implement and support the goals and objectives.

II-D REVIEW PROCESS

All proposals will be reviewed using a structured review system. Award selection will be based on merit as determined by points awarded by the Review Panel in accordance with the Scoring Rubric and all relevant information provided in the proposal. Based on this process, the OSE will provide formal funding recommendations to the State Superintendent.

The maximum score for the criteria is 100 points. The State Superintendent may apply other factors in making funding decisions such as the performance of the fiscal agent on previously funded initiatives. Bidders should refer to Appendix B for the Scoring Rubric.

SECTION III: Information Required from Bidder

The bidder's proposal is to be submitted in the format outlined below. Use only the alphabet and headings listed below and not the Roman numeral III.

III-A COVER

The cover page of the proposal must include: (1) the title of the grant for which the bidder is submitting a proposal for; (2) the organization name and address; (3) the phrase "Authorized Negotiator," followed by the typed name, title, and phone number of the person authorized to negotiate the proposed Grant Agreement with the Department of Education; and (4) the phrase "Submitted with the assurance that this proposal will remain valid for at least sixty days from the due date, by:" followed by the signature, typed name and title, and date of signature of the person authorized to execute legally binding Grant Agreements with the State of Michigan. Bidders may list alternate authorized negotiators in item (3) above.

III-B BUSINESS ORGANIZATION

State the full name and address of the organization and, if applicable, the branch office or other subordinate element that will perform or assist in performing the work proposed. Indicate whether the organization operates as an individual, partnership, or corporation. If it is operated as a corporation, include the state in which it is incorporated. If appropriate, state whether it is licensed to operate in the State of Michigan.

III-C UNDERSTANDING OF NEED

State in succinct terms an understanding of the problem(s) as presented by this RFP. Evidence of sufficient understanding should extend beyond a mere restatement or paraphrase of the "Understanding of Need" statement from the RFP. Support this understanding with examples of existing capacity if possible.

III-D WORK PLAN

Include a narrative summary description of the proposed services. Applicants should make specific reference to the objectives in II-B that are specific to the implementation of the grant.

III-E PRIOR EXPERIENCE

The organization must show the ability to perform as a fiscal agent. Proposals must include documentation of the following:

- a. History of sound fiscal oversight;
- b. Documented audit integrity;
- c. Documented ability to support fiscal components within timelines which may include copies of process flowcharts that may assist with demonstrating fiscal accountability;
- d. Documented experience in managing fiscal support for multiple initiatives simultaneously;
- e. Documented procedures and protocols for fiscal processes;

- f. Copies of employee contract templates, including employee/personnel policies and guidelines and other employment standards;
- g. Copies of standard forms used for financial transactions including: travel expense reimbursement, requisition for purchase orders (if applicable), stipends, contract service payment request, contract template for independent contractors, etc.

III-F ORGANIZATION CAPACITY AND HUMAN RESOURCES

The successful applicant must be able to support the project as a fiscal agent with personnel who possess talent and expertise in fiscal management. Describe the qualifications of the key personnel who will support the functions of a fiscal agent. Include resumes for each staff member.

III-G BUDGET

Partial budgets and estimated budget detail are provided below for each grant source. Bidders should describe their organization's capacity to manage both budgets. Bidders should also complete, to the best of their ability, the remaining sections of the budgets. This includes outlining any potential miscellaneous or other expenses, including fiscal agent staff (noting FTE), indirect and audit costs. Bidders may also want to take an opportunity to outline any possible in-kind contributions that can be made to the project.

Audits may be at actual cost or included in the indirect. Hardware, software and any other equipment needed to carry out the objectives of the project must be bid at educational discount prices and are subject to prior approval. Other allowable costs incurred for the benefit of the project could include: development of products and services related to operating the program, travel expenses for project staff, postage, telephone, and supplies when they relate directly to communication, dissemination, and technical assistance needed to operate the project.

Budget: Mandated Activities Funds for MiBLSi

| Budget Category | Budget Detail | Estimated Budget Amount |
|--|-----------------------------|--------------------------------|
| Project's Estimated Costs: | | |
| Personnel & Benefits | Approximately 25 FTE | \$2,395,000 |
| Purchased Services: | | |
| Contracted Services | | \$15,000 |
| Travel & Lodging | | \$170,000 |
| Conferences/Meetings/Trainings | | \$470,000 |
| Supplies, Materials, Misc. | | \$25,000 |
| Current Estimated Project Costs: | | \$3,075,000 |
| | | |
| Fiscal Agent's Estimated Costs: | | |
| Personnel & Benefits (Bidder should list grant personnel and FTE) | | |
| | | |
| Sub-Total: | | |
| | | |
| Below the line costs: | | |
| Indirect Costs (_____ %) | | |
| Audit | | |
| Capital Outlay (Equipment purchases over \$5,000) | | |
| Operations and Maintenance: | | |
| Rent | | |
| Additional Operating Expenses | | |
| | | |
| Grand Total (Not to exceed \$3,350,000) | | \$ |
| In-kind Contribution | | |

Instructions for completion:

Bidders who are submitting a proposal for the fiscal agent project should complete the above draft budget demonstrating estimated costs for services outlined within the RFP. This includes providing estimated costs for all budget items listed above for which estimated costs have not been provided. These costs are for services outlined in the RFP for which the potential grantee would be responsible.

Budget: State Personnel Development Grant Funds

| Budget Category | Budget Detail | Estimated Budget Amount |
|---|----------------------------|--------------------------------|
| Project's Estimated Costs: | | |
| Personnel & Benefits | Approximately 8 FTE | \$700,000 |
| Purchased Services: | | |
| Contracted Services | | \$45,000 |
| Travel & Lodging | | \$60,000 |
| Conferences/Meetings/Trainings | | \$425,000 |
| Supplies & Materials | | \$8,000 |
| Current Estimated Project Costs: | | \$1,238,000 |
| | | |
| To be Completed by Bidder: | | |
| Fiscal Agent's Estimated Costs: | | |
| Personnel & Benefits (Bidder should list type and number of needed FTE) | | |
| | | |
| Sub-Total: | | |
| | | |
| Below the line costs: | | |
| Indirect Costs (_____ %) | | |
| Audit | | |
| Capital Outlay (Equipment purchases over \$5,000) | | |
| Operations and Maintenance: | | |
| Rent | | |
| Additional Operating Expenses | | |
| | | |
| Grand Total (Not to exceed \$1,386,000) | | \$ |
| | | |

Instructions for completion:

Bidders who are submitting a proposal for the fiscal agent project should complete the above draft budget demonstrating estimated costs for services outlined within the RFP. This includes providing estimated costs for all budget items listed above for which estimated costs have not been provided. These costs are for services outlined in the RFP for which the potential grantee would be responsible.

III-H ADDITIONAL INFORMATION AND COMMENTS

Include any other information that is believed to be pertinent but not specifically asked for elsewhere.

III-I APPENDICES

Include Assurance of Grant Conditions which indicates agreement with grant conditions, as specified in paragraphs IV-H – IV-M. Do not include lengthy general lists of publications or other documents unless their inclusion is ESSENTIAL to reviewer's understanding of your proposal and you made explicit reference to them in the body of the proposal.

III-J PROPOSAL SUBMITTAL

The original copy bearing ORIGINAL signatures and six (6) additional copies (for a total of seven) of the complete proposal must be received on or before **5:00 P.M. Thursday, April 25, 2013** by **Ms. Liz Hengesbach** at the following address:

Michigan Department of Education
Office of Special Education
P.O. Box 30008
Lansing, Michigan 48909

Or

If shipping by overnight express or UPS mail, the following address must be used:

Michigan Department of Education
Office of Special Education
608 West Allegan Street
Lansing, Michigan 48933

SECTION IV: CONDITIONS OF APPLICANT

If awarded this grant, I understand and agree to the following:

IV-A INCURRING COSTS

The State of Michigan is not liable for any cost incurred by any bidder prior to execution of a Grant Agreement.

IV-B GRANTEE RESPONSIBILITIES

The Grantee will be required to assume responsibility for all activities offered in this proposal whether or not he/she performs them. Further, the State will consider the Grantee to be the sole point of contact with regard to matters, including payment of any and all charges, resulting from the anticipated Grant Agreement.

IV-C RELEASE OF INFORMATION/CONFIDENTIALITY

Grantee initiated publication or news releases of any information pertaining to the Grant Agreement, work performed under the Grant Agreement, products of the work and materials based upon the products shall occur only with written prior approval of the MDE, OSE.

IV-D ACCOUNT AND AUDIT REQUIREMENTS

The applicant will maintain a separate accounting of expenditures for the grants for each fiscal year it is awarded. Funds will only be requested as needed to meet immediate obligations and shall not be drawn for purposes other than those directly related to the Grants. Generally accepted accounting procedures will be used. The Agency's independent auditor will be made aware of the grants so that the auditor can review expenditures as required by federal single audit requirements. The auditor must review all contracts over \$25,000. Current employees of the MDE may not be employed or contracted under this grant.

Expenses charged to these grants will not be charged to any other state or federal source and should follow federal guidelines including but not limited to EDGAR and OMB Circular A-87. These grants will not be used to supplement mandated state or local costs.

IV-E DISCLOSURE

After the MDE awards a grant under a RFP, all information in a bidder's proposal is subject to the provisions of the Freedom of Information Act, Public Act 442 of 1976. This Act also provides for the complete disclosure of Grant Agreements and attachments thereto.

IV-F GRANT PAYMENT SCHEDULE

The payment schedule for any Grant Agreement entered into as a result of the RFP will be negotiated and reflect the restrictions of the funding source. The schedule should show payment amount and should reflect actual work done by the payment dates.

IV-G OWNERSHIP

Ownership of intellectual property resulting from these grants shall remain with the MDE, which reserves the right to copyright or patent them, or otherwise protect their integrity or availability for public use. This stipulation covers recipients as well as sub-contractors receiving funds through this grant program.

IV-H INDEMNIFICATION

The Grantee, as a condition of the Grant Agreement that may ensue from the RFP, shall indemnify and hold harmless the State of Michigan and its agents and employees from and against all claims, damages, losses and expenses, including attorney fees arising out of or resulting from the performance of the work, which includes all labor, materials and equipment required to produce the commodity, construction and/or service required by the Grant Agreement, provided that any such claim, damage, loss or expense (1) is attributable to bodily injury, sickness, disease or death, or injury to or destruction of tangible property (other than the work itself), including the loss of use resulting therefrom, and (2) is caused in whole or in part by any negligent act or omission of the Grantee, and sub-grantee, anyone directly or indirectly employed by any of them or any of whose acts any of them may be liable, regardless of whether or not it is caused in part by a party indemnified hereunder.

In any and all claims against the State of Michigan or any of its agents or employees by any employee of the Grantee, any sub-grantee, anyone directly or indirectly employed by any of them or anyone for whose acts any of them may be liable, the indemnification obligation under this indemnification agreement shall not be limited in any way by any limitation of the amount or type of damages, compensation or benefits payable by or for the Grantee or any sub-grantee under Workers' Disability Compensation Acts, disability benefit acts or other employer benefit acts.

The obligations of the Grantee under this indemnification agreement shall not extend to the liability of the State of Michigan, its agents or employees arising out of (1) the preparation or approval of maps, drawings, opinions, reports, surveys, change orders, designs or specifications, or (2) the giving of or the failure to give directions or instructions by the State of Michigan, its agents or employees, provided such giving or failure to give is the primary cause of the injury or damage.

IV-I GRANTEE'S LIABILITY INSURANCE

The Grantee, as a condition of the Grant Agreement that may ensue from their RFP, shall purchase and maintain such insurance as will protect the Grantee from claims set forth below which may arise out of or result from the Grantee's operations under the Grant Agreement, whether such operations be by the Grantee or by any sub-grantee or by anyone directly or indirectly employed by any of them, or by anyone for whose acts any of them may be liable.

1. Claims under worker's disability compensation, disability benefit and other similar employee benefit act. A non-resident Grantee shall have insurance for benefits payable under Michigan's Workers' Disability Compensation Law for any employee resident of and hired in Michigan; and respects any other employee protected by Workers' Disability Compensation Laws of any other state, the Grantee shall have insurance or participate in a mandatory state fund to cover the benefits payable to any such employee.
2. Claims for damages because of bodily injury, occupational sickness or disease, or death of his/her employees.
3. Claims for damages because of bodily injury, sickness or disease, or death of any person other than his/her employees, subject to limits of liability of not less than \$300,000 each occurrence and when applicable, \$300,000 annual aggregate, for non-automobile hazards and as required by law for automobile hazards.
4. Claims for damages because of injury to or destruction of tangible property, including loss of use resulting therefrom, subject to a limit of liability of not less than \$50,000 each occurrence for non-automobile hazards and as required by law for automobile hazards.
5. Insurance for sub-paragraphs (3) and (4) non-automobile hazards on a combined single limit of liability basis shall not be less than \$300,000 each occurrence and when applicable, \$300,000 annual aggregate.

The insurance shall be written for not less than any limits of liability herein specified or required by law, whichever is greater, and shall include contractual liability insurance as applicable to the Grantee's obligations under the indemnification clause of the Grant Agreement.

IV-J NON-DISCRIMINATION AND OTHER COMPLIANCE WITH LAW

Each proposal must include an assurance statement of compliance with all Federal and Michigan laws and regulations prohibiting discrimination and with all requirements and regulations of the MDE and the U.S. Department of Education. The assurance must state that it is the policy of the bidder's organization that no person on the basis of race, color, religion, national origin or ancestry, age, sex, marital status, or disability shall be discriminated against, excluded from participation in, denied the benefits of or otherwise be subjected to discrimination in any program or activity for which the bidder is responsible or for which the bidder receives funding from the U.S. Department of Education or the MDE.

IV-K AMERICANS WITH DISABILITIES ACT

The MDE is committed to providing equal access to all persons in admission to or operation of its programs and services. Individuals with disabilities needing accommodations for effective participation in this grant program are invited to contact the MDE for assistance.

IV-L EQUITABLE ACCESS

All Mandated Activities Project Development and Implementation activities must promote equitable access to support meaningful implementation of the Project and to insure continuity and adherence to stated OSE goals and objectives.

IV-M ACCEPTANCE OF PROPOSAL CONTENT

The contents of the proposal of the successful bidder may become contractual obligations, if a Grant Agreement ensues. Failure of the successful bidder to accept these obligations may result in cancellation of the award.

IV-N CONTINUATION OF FUNDING

Continuation funding for this grant project is subject to the availability of funds and the performance of the grant recipient. The MDE, OSE can cancel the grant with 30 days written notice for:

- Default of the Contractor.
- In the event the OSE no longer needs the services or product specified in the Contract, or in the event program changes, changes in laws, rules or regulations, or the OSE determines that statewide implementation of the Contract is not feasible.
- Reduction in or elimination of funding allocations to the MDE under the IDEA, or any sub-part of the IDEA.
- Fiscal constraints that may occur as a result of compliance and improvement priorities.

IV-O ASSURANCE OF GRANT CONDITIONS

The submission of a proposal, signed by an official authorized to bind the agency submitting the proposal contractually, shall constitute assurance that the proposing agency has accepted, unconditionally and without reservation, all conditions, requirements, and specifications of the RFP. In addition, such submission shall constitute assurance that the submitting agency understands that all or any part of the RFP may be included by reference in any Grant Agreement based on the RFP. See Appendix A.

Appendix A

| | |
|---|--|
| Applicant Agency (Name and Address) | Fiscal Agent Contact (Name, Title, Address, Phone) |
| Implementing Agencies (Name and Address) | Authorized Negotiator (Name, Title, Address, Phone) |
| Project Title and Summary | |

Authorizing Official Signature

The undersigned, having become thoroughly familiar with an understanding of all the proposed documents attached hereto, agrees to provide the services as specified herein, for the total fees as stipulated herein, subject to negotiation.

I hereby state that all of the information I have provided is true, accurate, and complete. I hereby state that I have authority to submit this proposal, which will become a binding agreement if accepted by the Michigan Department of Education. I hereby state that I have not communicated with, nor accepted anything of value from an employee of the Office of Special Education that would tend to destroy or hinder free competition.

I hereby state that I have read, understand, and agree to be bound by all the terms of Section III of this document.

Application is hereby made for a Michigan Department of Education grant in the amount and for the purposes set forth in this proposal.

Signature of Authorized Official

Title

Date

**Mandated Activities Project
Michigan's Integrated Behavior and Learning Support Initiative (MiBLSi)**

RUBRIC

A. Statement of Need

Applicant must provide a succinct and accurate explanation of the need for a fiscal agent to coordinate funding of services and activities of the proposed project.

This section is worth a maximum of **5 points**.

| Marginally comprehensive, lacks rigor | Comprehensive, rigorous | Exceptionally comprehensive and rigorous |
|---|---|---|
| A minimal explanation of the need for a fiscal agent is provided OR need is not addressed. | A general explanation of the need for a fiscal agent is provided. | A comprehensive explanation of the need for a fiscal agent is provided. |
| Statement of Need 5 Points Maximum | | |
| Description | Independent Rating | Score |
| The proposal describes a need for a fiscal agent to facilitate the funding mechanism of the MiBLSi project. | 0 3 5 | |
| Comments: | | |
| Section Total: _____ | | |

B. Work Plan

Applicant must provide a clear description of the Fiscal Agent responsibilities to be carried out, including a plan for communicating to the OSE, MiBLSi Project Director, and participating organizations/sub-grantees.

This section is worth a maximum of **40 points**.

| Marginally comprehensive, lacks rigor | Comprehensive, rigorous | Exceptionally comprehensive and rigorous |
|---|--|---|
| A vague description of project accounting policies, procedures, and methods is provided OR project accounting is not addressed. | A general description of the project accounting policies, procedures, and methods is provided. | A comprehensive and well developed description of project accounting policies, procedures, and methods is provided. |
| A minimal description of how the Grantee will communicate with and report to the OSE, MiBLSi Project Director, and participating organizations/sub-grantees is provided OR communication and reporting is not addressed | A general description of how the Grantee will communicate with the OSE, MiBLSi Project Director, and participating organizations/sub-grantees is provided. | A comprehensive and well developed description of how the grantee will communicate with and report to the OSE, MiBLSi Project Director, and participating organizations/sub-grantees is provided. Appropriate timelines are included in the response. |
| Minimal description of disbursing policy, procedure, and methods is provided OR disbursing funds is not addressed. | A general description of disbursing policy, procedure, and methods is provided. | A comprehensive and well developed description of disbursing policy, procedure, and methods is provided. A description of the alignment between disbursements and project accounting is provided. |
| A minimal description of inventory policy, procedures, and methods is provided for assets/capital outlay acquired through this project OR inventory is not addressed. | A general description of inventory policy, procedure, and methods is provided for assets/capital outlay acquired through this project. | A comprehensive and well developed description of inventory policy, procedure, and methods is provided for assets/capital outlay acquired through this project. |

| Work Plan 40 Points Maximum | | |
|---|--------------------|-------|
| Description | Independent Rating | Score |
| The proposal describes project accounting policies, procedures, and methods to be used by the Grantee as Fiscal Agent for the MiBLSi project. | 0 5 10 | |
| The proposal describes how the Grantee will communicate with and report to the OSE, MiBLSi Project Director, and participating organizations/sub-grantees, including appropriate timelines for that communication. | 0 5 10 | |
| The proposal describes disbursing policy, procedure, and methods to be used by the Grantee as the Fiscal Agent for the MiBLSi project, including the alignment between disbursements and project accounting for both grant budgets. | 0 5 10 | |
| The proposal describes inventory policy, procedure, and methods for assets/capital outlay acquired through the MiBLSi project. | 0 5 10 | |
| Comments: | | |
| <p style="text-align: right;">Section Total: _____</p> | | |

C. Prior Experience and Internal Controls

Applicant must provide a description of the Applicant's prior experience and the internal controls in existence that will be used to fulfill the Fiscal Agent responsibilities of the project.

This section is worth a maximum of **20 points**.

| Marginally comprehensive, lacks rigor | Comprehensive, rigorous | Exceptionally comprehensive and rigorous |
|--|---|---|
| The proposal provides assurances with few specifics of the existing internal controls; timelines for payments of authorized expenses; and documentation requirements needed from MiBLSi Project Director to ensure timely payment OR documentation requirements are not addressed. | The proposal provides a general description of the existing internal controls; timelines for payments of authorized expenses; and documentation requirements needed from MiBLSi Project Director to ensure timely payments. | A comprehensive and well developed description of the existing internal controls; identifies timelines for payments of authorized expenses; and documentation requirements needed from MiBLSi Project Director to ensure timely payments. |
| The proposal provides general descriptions of the agency's most recent experience with state and federal programs, audit or monitoring results, and findings verifying appropriate internal controls are in place OR appropriate internal controls are not addressed . | The proposal describes the agency's most recent 3-year experience with state and federal programs, audit and monitoring results, and findings verifying appropriate internal controls are in place. | The proposal provides evidence of the agency's most recent 3-year experience with state and federal programs, audit and monitoring results, and findings verifying appropriate internal controls are in place. |
| Prior Experience and Internal Controls 20 Points Maximum | | |
| Description | Independent Rating | Score |
| The proposal describes the existing internal controls, identifies timelines for payments of authorized expenses, and documentation requirements needed from the MiBLSi Project Director to ensure timely payments. | 0 5 10 | |
| The proposal describes the agency's most recent 3-year experience with state and federal programs, audit and monitoring results and findings verifying appropriate internal controls are in place. | 0 5 10 | |
| Comments: | | |
| Section Total: _____ | | |

D. Organization Capacity and Human Resources

Applicant must submit a proposal with key personnel who will implement the fiscal responsibilities. A review of each application will be made to determine whether the qualifications of key personnel are appropriate. Describe key personnel in the Grantee's organization that will provide fiscal oversight.

This section is worth a maximum of **20 points**.

| Marginally comprehensive, lacks rigor | Comprehensive, rigorous | Exceptionally comprehensive and rigorous |
|---|---|--|
| The proposal provides marginal evidence of the qualifications and experiences of key personnel to ensure completion of Fiscal Agent responsibilities OR qualifications and experiences of key personnel are not addressed . | The proposal provides evidence that the key personnel are qualified to carry out the fiscal responsibilities of the project and demonstrates an awareness of the need for dedicated time for Fiscal Agent responsibilities. | The proposal provides ample evidence of the qualifications of the key personnel to carry out the fiscal responsibilities of the project and provides the percentage of time each person will commit to these duties. Resumes are provided. Key personnel will be experienced in state and/or federal grant/program administration. |
| | | |
| Organization Capacity and Human Resources 20 Points Maximum | | |
| Description | Independent Rating | Score |
| The proposal describes the qualifications of the key personnel to carryout the fiscal responsibilities of the project and provides the percentage of time each person will commit to these duties. Resumes are provided. | 0 5 10 | |
| Key personnel have experience with state and/or federal grant/program administration. | 0 5 10 | |
| Comments: | | |
| | | |
| Section Total: _____ | | |

E. Project Budget

Applicant must provide budgets demonstrating estimated costs for services outlined within the RFP. This includes providing estimated costs for line items that have not been provided. These costs are for services outlined in the RFP for which the potential grantee would be responsible.

This section is worth a maximum of **15 points**.

| Marginally comprehensive, lacks rigor | Comprehensive, rigorous | Exceptionally comprehensive and rigorous |
|--|--|--|
| The budget is limited in scope and does not provide a detailed plan of how grant funds will be expended. | <p>The budget is cost effective, complete and provides information on salaries and other expenses.</p> <p>The budget demonstrates realistic costs and an understanding of the appropriate Fiscal Agent responsibilities.</p> | <p>The budget is cost effective to support the project and shows a clear and detailed relationship between budget items and project objectives.</p> <p>The budget demonstrates realistic costs and an understanding of appropriate fiscal agent responsibilities.</p> <p>The budget clearly identifies indirect and administrative expenses.</p> |
| Project Budget 15 Points Maximum | | |
| Description | Independent Rating | Score |
| The budget is cost effective to support the project and shows a clear and detailed relationship between budget items and project objectives. | 0 3 5 | |
| The budget demonstrates realistic costs and an understanding of appropriate Fiscal Agent responsibilities. | 0 3 5 | |
| The budget clearly identifies indirect and administrative expenses. | 0 3 5 | |
| Comments: | | |
| Section Total: _____ | | |

| Proposal Total | | |
|---|---------|-------|
| Section | Maximum | Score |
| Statement of Need | 5 | |
| Work Plan | 40 | |
| Prior Experience and Internal Controls | 20 | |
| Organization Capacity and Human Resources | 20 | |
| Project Budget | 15 | |
| Comments: | | |
| Proposal Total: _____ | | |